



Electronic Research Administration
A program of the National Institutes of Health



National Institutes of Health
Office of Extramural Research

Account Management System (AMS) User Guide for State Dept

Oct 26, 2017



CONTACT US

Document Comments:

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How are we doing? The Communications & Documentation Team of the electronic Research Administration (eRA) is dedicated to serving our community and welcomes your feedback to assist us in improving our user guides. Please send comments about the user guide to this address: eRACommunications@mail.nih.gov.

Troubleshooting support:

Please contact the eRA Help Desk:

Toll-free: 1-866-504-9552

Phone: 301-402-7469

TTY: 301-451-5939

Web:<http://grants.nih.gov/support> (Preferred method of contact for **external** users)

Web:https://inside.era.nih.gov/eRA_helpdesk.cfm (Preferred method of contact for **internal** users)

Email:commons@od.nih.gov (for Commons Support)

Email:helpdesk@od.nih.gov (for IMPAC II Support)

Hours: Mon-Fri, 7:00 a.m. to 8:00 p.m. Eastern Time

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1.1 Latest Updates

Updates and new features in AMS:

Oct 26, 2017

- The account unlock operation now requires the user to login that day: When an administrator unlocks an account that's been locked due to inactivity, an email notification is sent that asks the user to login to the account that same day. If the user does not login before the end of the day, the account is locked again.

Feb 16, 2017

- The AMS User Guide has been split into separate documents for each user domain (Agency, Commons, iEdison, State Dept). When you login to AMS, the system recognizes your domain and uses it to select the correct online help package.
- It's now possible to search for system accounts by IMPACII user ID.
- Added a more prominent link to the Person Administration module in the Manage Account and Create Account confirmation screens. Click to manage user names and other personal information.

Dec 22, 2016

- When you unlock an account, the user receives a notification saying that he or she has to login to the account on that same day or the account will be relocked. See [Reactivate Account](#)
- eRA Service Desk agents can click the **Add Roles to Other org** button to give a system account roles in another organization. See [Add/Delete System Roles](#)
- Added instructions for verifying a new Commons account when you receive a *Notification of New Account* from eRA. See [Notification of New Account](#)

Nov 17, 2016

- Removes all roles associated with an account when Account Coordinators or Service Desk Agents deactivate the account.

- Allows Account Coordinators to re-certify active accounts to prevent the account holder from getting locked out. Note it will be a requirement for Account Coordinators to input a comment and upload an account request form to clarify the re-certification.
- Allows eRA Service Desk Agents to reactivate users and add mapping if no mapping exists.
- Enhances Deactivated Users Report to display correct information, including Deactivated By and Account Deactivation Date.
- Updates the email notifications sent prior to account deactivation to indicate that users should contact their Account Coordinator instead of the eRA Service Desk to request account re-activation.

Sept 15 2016:

- The Create Account screen now lets NIH/Agency administrators search the NED system to find user profiles in their organizations. See [Create Agency Accounts](#) for more information.
- Create-Account requests for untrusted Commons accounts can now be approved or rejected automatically. See [Create Commons or external iEdison User Accounts](#) for more information.

Aug 18 2016:

- Enhancements to the reporting functionality, including a new internal report on deactivated user accounts. See [User Reports](#).
- Account Coordinators can now upload new or revised account request forms from the Manage Account screen. See [Manage Account Request Forms](#) for instructions.
- Account Coordinators and Service Desk agents can now search for accounts that have been locked due to inactivity and reactivate them. See [Search by Status](#) for instructions.
- New requirements for accounts with administrative roles: Once a user has held an administrative role (SO/AO, AA, BO, or TTO Admin/User) at one institution, that account cannot be changed to a strictly scientific role, and cannot be affiliated to a different institution in any administrative **or** scientific role: In these cases, the former administrative user must create a new account to use in his or her new role. See [Affiliate Account](#) for more information.

July 22 2016:

- Service Desk Agents can now update User IDs on their accounts.
- In the Search Results screen, the label of the Filter box has been changed to Filter Results.
- Search-by-country functionality is now available for state accounts.

June 23 2016:

- AMS validates users' affiliations for administrative roles (SO/AO, AA or BO user roles) to make sure users have administrative roles at only one institution.
- The Account Coordinator (or the Service Desk) can now view and if necessary replace an account's Account Request Form (ARF).

2 Overview

The Account Management System (AMS) facilitates user and system account administration based on assigned user roles. The system provides the ability to search existing accounts. When a search is performed, all records that meet the search criteria are returned on the *Search Accounts* screen.

2.1 State Department Staff

State Department staff have the ability to search, create, maintain, and view user accounts only.

Authorized users can:

- Create new user accounts.
 - The Username and password must comply with [Standard eRA policy guidelines](#).
 - All temporary passwords are system generated.
- Manage existing user accounts.
- Manage role(s) on user accounts.
- Affiliate an account with an Organization, Agency, or Institute/Center (IC).
- Reset passwords on existing accounts.
 - **NOTE:** All passwords are system generated.

2.2 User Roles

The following users have the ability to search for, manage and create accounts, and to add or remove roles for user and system accounts:

2.2.1 State Department

- FACTS State Department Clearance Manager (FACTS SDC MGR role)

2.3 Account Statuses

AMS user accounts can have the following statuses:

- *Active* — A valid account in good standing.
- *Deactivated* — Account has been disabled by an administrator
- *Locked due to inactivity* — Locked by the system due to inactivity (no user activity for 120 days).
- *Pending Affiliation* — Account has not yet been associated to an organization
- *Profile Only* — A profile that is not associated to a user account.

3 Accessing AMS

3.1 State Department Staff

1. State Department staff can access AMS at this address: <https://public.era.nih.gov/ams>.

When you click that link, the *Commons Login* screen opens, as shown here.

Commons Login

*Required field(s)

*Username

*Password

Login Reset

(For External Users Only)

(For External Users)

[Forgot Password/Unlock Account?](#)

Federated Institutions/Organizations

Select Sign in

Federal User Login [Here](#)

eRA Service Desk

Hours: Mon-Fri, 7AM-8PM EDT/EST

Web: <http://grants.nih.gov/support>

Toll-free: 866-504-9552

Phone: 301-402-7469

Contact initiated outside of business hours via Web or voice mail will be returned the next business day.

Welcome to the Commons

System Notification Message

All systems are currently available.

Scheduled Commons Maintenance: For maintenance information, see the [eRA Scheduled Maintenance Calendar](#).

Support Related Resources

- Electronic Submission: Learn about the most frequent application errors at [Avoiding Common Errors](#).
- Electronic Application Submission: To learn about completing and submitting an electronic grant application and access helpful resources, visit the [eCommons Electronic website](#).
- eRA Home Page: To find Commons [FAQs](#), [User Guides](#), training materials, and step-by-step instructions for performing tasks in Commons, visit the [eRA website](#).

Commons Related Resources

- Reference Letters: To submit a reference letter when requested by an applicant, please follow this link: [Submit Reference Letter](#).
- Demo Facility: [Demo Facility](#) allows you to try most of the capabilities of the NIH eRA Commons in a sample environment.

Privacy Act Statement

This is a U.S. Government computer system, which may be accessed and used only for authorized Government business by authorized personnel. Unauthorized access or use of this computer system may subject violators to criminal, civil, and/or administrative action. Use of the eRA Commons website requires gathering personal information as part of the NIH grant proposal submission and administration process. Grant proposals are treated as confidential until awards are made. Upon award, the title, principal investigator name(s), abstracts, and award amount are disclosed publicly. Other information may be made available within and outside the NIH through routine uses, as described in SORN 09-25-0036, or, subject to the provisions of the Freedom of Information Act 5 U.S.C. 552. Your activity while using this site is not anonymous: to protect the site, NIH tracks the IP address and login information that is used for access, as well as the individual pages you visit. The IP address is used to help verify user ID and to provide information specific to the user's interest and/or to respond to user queries. A more detailed notice is provided [here](#).

Register Grantee Organization

About the Commons

- [Frequently Asked Questions](#)
- [Latest Release Notes](#)

Additional Links

- [RePORT](#)
- [Grants.gov](#)
- [eCommons](#)
- [National Institutes of Health](#)
- [Public Access Policy Page](#)
- [Loan Requirement Program](#)
- [Commons Quick Queries](#)

2. Enter your **User Name** and **Password**.
3. Click the **Login** button.

Upon successful login, the *Search Accounts* screen opens, as shown here.

NOTE: The only **User Type** available is *State*.

U.S. Department of Health & Human Services | National Institutes of Health | Office of Extramural Research | Jim Shorts | Help | Contact Us | Logout

Electronic Research Administration
A program of the National Institutes of Health

AMS

Manage Accounts | Change Password

Search Accounts

Search Criteria

☒ Search within my organization

NOTE! You must enter at least one search field, besides User Type and Account Status.

User Type: State (dropdown) | Account Status: All (dropdown) | User ID: [text field]

Last Name: [text field] | First Name: [text field] | Middle Name: [text field]

Countries(s): [text field]

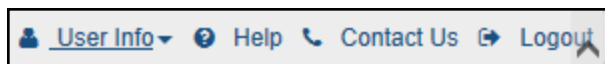
Email: [text field] | Roles: [text field]

Search | Clear

For instructions on performing a search, see [Search Account](#).

3.2 Logging Out of Account Management System (AMS)

To log out of AMS, click the **Logout** button at the top right corner of the any screen.



4 Search for State Department User Accounts

The *Search Accounts* screen for State Department users provides the ability to search for existing user accounts.

NOTE: For State Department users the **Search within my organization** check box is automatically checked and the only **User Type** is *State*.

The screenshot shows the 'Search Accounts' interface. At the top, there's a navigation bar with 'U.S. Department of Health & Human Services', 'NIH', 'National Institutes of Health', and 'Office of Extramural Research'. Below this is the 'eRA Electronic Research Administration' header. The main content area has a 'Search Accounts' title and a 'Search Criteria' section. In the 'Search Criteria' section, the 'Search within my organization' checkbox is checked. Below this, a note states: 'NOTE! You must enter at least one search field, besides User Type and Account Status.' The search fields include 'User Type' (set to 'State'), 'Account Status' (set to 'All'), 'User ID', 'Last Name', 'First Name', 'Middle Name', 'Countries(s)', 'Email', and 'Roles'. At the bottom, there are 'Search' and 'Clear' buttons.

NOTE: You must enter at least one search field, besides the **User Type** and **Account Status**. Wild card characters such as the percent sign (%) can be used to search for a string of characters.

1. Enter the appropriate search criteria in at least one of the other search fields.
2. Perform one of the following options:
 - a. Click the **Search** button to execute the search.
 - i. Please refer to the [State Department User Account Search Results](#) topic.
 - b. Click the **Clear** button to clear the search criteria.

4.1 State Department User Account Search Results

When the **Search** button is clicked, the system displays appropriate user accounts in the **Search Results** located below the *Search Criteria* section on the *Search Accounts* screen. The search

results are sorted alphabetically first by last name, first name in the **Name** field and then by **Account Status**.

NOTE: The **Create New Account** button does not display until a search is performed.

The following columns appear in the search results:

- **User ID**
- **Name** - last name, first name
- **Email**
- **Account Status** -
 - *Active* - The **Manage** button displays in the **Action** column.
 - *Pending Affiliation* - The **Manage** button displays in the **Action** column.
- **Roles & Affiliations** - FACTS SDC MGR ROLE only
- **Action** - The **Action** buttons are **Create** and **Manage**.

AMS

Manage Accounts

Search Accounts ⓘ

Search Criteria

Search Results

Filter Results:

Showing 1 - 10 of total 11

Show 10 per page < 1 2 >

User ID	Name	Email	Account Status	Roles & Affiliations	Action
SHORTSSHO	Shorts, Short	eRATest@mail.nih.gov	Active	FACTS_SDC_MGR_ROLE - India	Manage
SHORTSJIM	Shorts, Jim	eRATest@mail.nih.gov	Active	FACTS_SDC_MGR_ROLE - Burma	Manage
SHORTSSHO	Shorts, Short	eRATest@mail.nih.gov	Active	FACTS_SDC_MGR_ROLE - Turkey	Manage
SHORTSJIM	Shorts, Jim	eRATest@mail.nih.gov	Active	FACTS_SDC_MGR_ROLE - Bahamas	Manage
SHORTSSHO	Shorts, Short	eRATest@mail.nih.gov	Active	FACTS_SDC_MGR_ROLE - Jamaica	Manage
SHORTSJIM	Shorts, Jim	eRATest@mail.nih.gov	Active	FACTS_SDC_MGR_ROLE - New Zealand	Manage
SHORTSSHO	Shorts, Short	eRATest@mail.nih.gov	Active	FACTS_SDC_MGR_ROLE - Ireland	Manage
SHORTSJIM	Shorts, Jim	eRATest@mail.nih.gov	Active	FACTS_SDC_MGR_ROLE - Aruba ... Read More	Manage
SHORTSSHO	Shorts, Short	eRATest@mail.nih.gov	Active	FACTS_SDC_MGR_ROLE - Slovenia	Manage
SHORTSJIM	Shorts, Jim	eRATest@mail.nih.gov	Active	FACTS_SDC_MGR_ROLE - Costa Rica	Manage

Create New Account

Back to top

Perform one or more of the following steps :

1. To view the **Search Criteria**, click anywhere in the **Search Criteria** bar.
2. To filter the search results, enter the appropriate value in the **Filter:** text box and hit the **<Enter>** key.
 - a. For example, to view all users with the word *Ann* in the **Name** or **User ID**, type *ANN* in the **Filter:** text box.

NOTE: The default number of records per page is 10.

3. To change the number of records per page, select the appropriate number in the **Show per page** column.
4. To navigate between pages, perform one of the following options:
 - a. Click the appropriate **Page Number** button.
 - b. Click the **right double arrows** button to go to the end of the list.
 - c. Click the **left double arrows** button to go to the beginning of the list.
5. To sort the search results, click the appropriate column heading name's **down arrow** (ascending sort) or the **up arrow** (descending sort). The default sort is by **Name** (Last Name, First Name).
6. If displayed, click the **Read More** hyperlink in the **Roles and Affiliations** column to view a Principal Investigator's (PI) multiple affiliations.
7. To perform one of the options in the **Action** column, please refer to the [Actions Options](#) topic.
8. To create a new account and profile click the **Create New Account** button at the bottom of the screen.
 - a. Please refer to the [Create State Department User Accounts](#) topic for more information.
9. To return to the top of the screen, click the **Back to top** hyperlink.

5 Create State Department User Accounts

1. To create an account perform a search first.
 - a. for instructions see [Search Account for State Department Users](#).

When the **Create New Account** button is clicked on the *Search Accounts* screen, the *Create Account* screen opens.

AMS
Manage Accounts

Create Account ⓘ

All fields are required unless they're marked (Optional)

Go Back

User Information

User Type
State ▼

User ID ⓘ

Primary Organization
U.s. Department of State

Contact Information

Last Name First Name Middle Name (Optional)

Email Confirm Email

Roles ⓘ

+ Add Countries

Create Clear

Perform the following steps :

2. The **User Type** is State.
3. Enter the **User ID** or let the system generate one.
 - a. The **User ID** length should be between 6 and 30 characters and should **NOT** contain special characters except the @ sign, the hyphen, the period, and the underscore.
 - b. The system can display the following messages: *This User ID is available* OR *This User ID is already taken, please use another one.*
4. To add countries, click the + **Add Countries** button.
 - a. Please refer to the [Add Countries](#) topic for more information.

5. Perform one of the following options:
 - a. When the account information is complete, click the **Create** button.
 - b. Click the **Clear** button to clear the data entered in the fields.

When the **Create** button is clicked, the system displays the following message on the *Account Details* screen: *Account created successfully*.

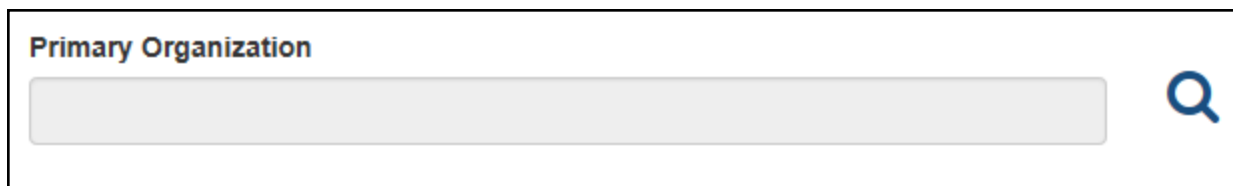
The screenshot shows the 'Account Details' screen in the AMS system. At the top, there is a 'Manage Accounts' tab. The main content area is titled 'Account Details' with a help icon. A green success message box at the top states 'SUCCESS Account created successfully!'. Below this, the 'User Information' section displays: User Type (State), User ID (SHORTSLOIS), and Primary Organization (U.s. Department of State). The 'Contact Information' section displays: Name (Shorts, Lois) and Email (eraTest@mail.nih.gov). The 'Roles' section shows a table with one role: 'FACTS_SDC_MGR_ROLE' from 'Finland'. The table has a 'Country' dropdown menu. At the bottom, there are two buttons: 'Manage' and 'Back to Search', both highlighted with red circles. A 'Go Back' link is also visible in the top right corner of the main content area.

Role(s)	Country
FACTS_SDC_MGR_ROLE	Finland

6. Perform one of the following options on the *Account Details* screen:
 - a. To return to the *Search Accounts* screen displaying the previous search results, click the **Go Back** hyperlink.
 - b. To edit the account's information, click the **Manage** button.
 - i. For more information, please refer to the [Manage State Department User Accounts](#) topic.
 - c. To return to the *Search Accounts* screen to enter new search criteria, click the **Back to Search** button.

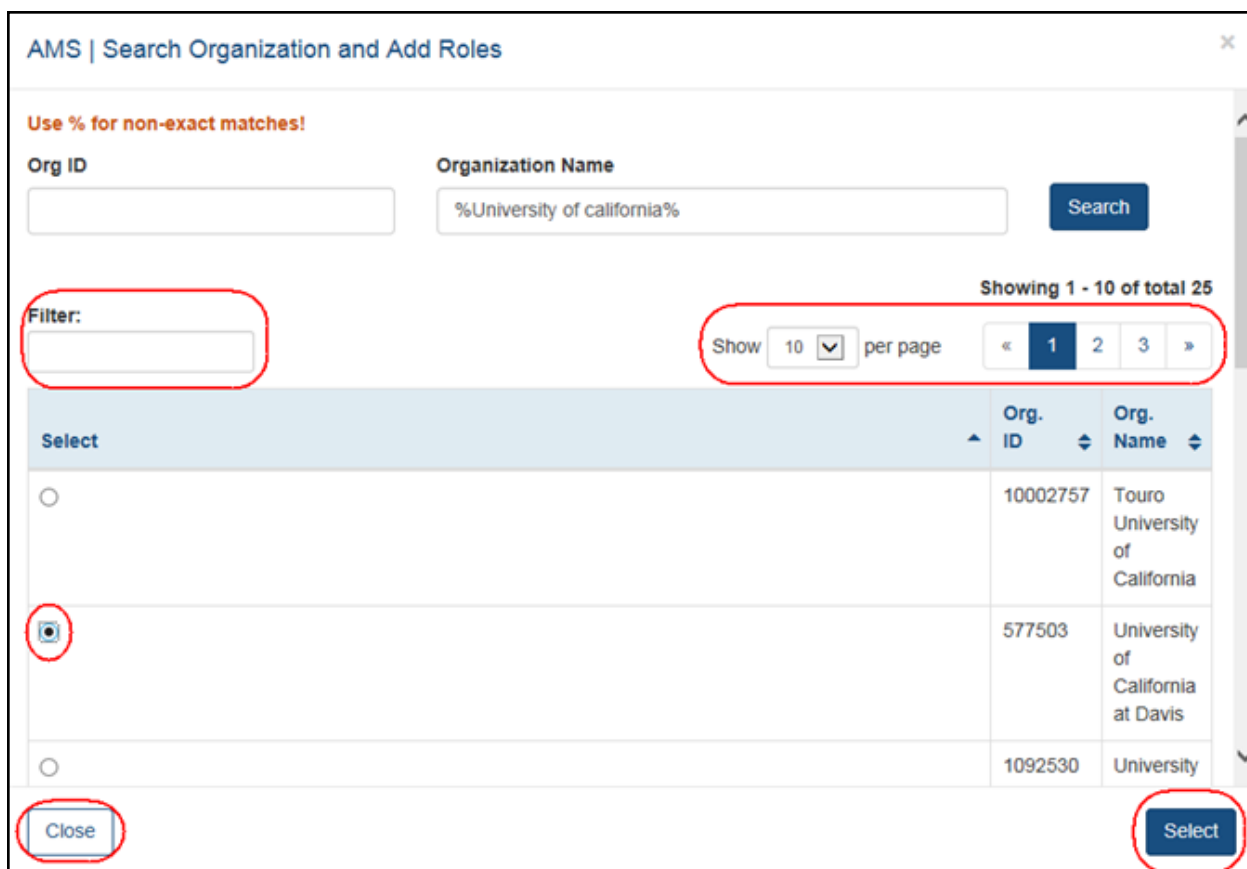
5.1 Set Primary Organization

NOTE: The **magnifying glass** for the **Primary Organization** field on the *Create Account* screen appears if the logged in user is not affiliated with an Organization, IC, or Agency. Usually the **Primary Organization** defaults to the logged in user's Organization.

A screenshot of the 'Primary Organization' field on the 'Create Account' screen. It consists of a large, light gray rectangular input box. To the right of the input box is a blue magnifying glass icon.

1. To add a primary organization click the **magnifying glass** icon on the *Create Account* screen.

When the **magnifying glass** icon is clicked, the *Search Organization and Add Roles* screen opens.

A screenshot of the 'AMS | Search Organization and Add Roles' screen. The screen has a header with the title and a close button. Below the header, there's a section with the text 'Use % for non-exact matches!'. This section contains two input fields: 'Org ID' and 'Organization Name'. The 'Organization Name' field contains the text '%University of california%'. To the right of these fields is a 'Search' button. Below the search fields, there's a 'Filter:' label and an empty input box. To the right of this is a 'Showing 1 - 10 of total 25' text. Below this text is a 'Show' dropdown menu set to '10', followed by 'per page' and a pagination control with buttons for '«', '1', '2', '3', and '»'. The main part of the screen is a table with three columns: 'Select', 'Org. ID', and 'Org. Name'. The table has three rows of data. The first row has a radio button, '10002757', and 'Touro University of California'. The second row has a radio button, '577503', and 'University of California at Davis'. The third row has a radio button, '1092530', and 'University'. At the bottom of the screen, there are two buttons: 'Close' on the left and 'Select' on the right.

2. Enter an **Org ID** or an **Organization Name**.

NOTE: Wild card characters such as the percent sign (%) can be used to search for a string of characters.

3. Click the first **Search** button.

When the first **Search** button is clicked, the organization is displayed, if present.

4. To filter the search results, enter the appropriate value in the **Filter:** text box and hit the **<Enter>** key. For example, enter *San Diego* to view only those universities in California.
5. To change the number of records per page, select the appropriate number in the **Show per page** column.
6. To navigate between pages, perform one of the following options:
 - a. Click the appropriate **Page Number** button.
 - b. Click the **right double arrows** button to go to the end of the list.
 - c. Click the **left double arrows** button to go to the beginning of the list.
7. Select the appropriate organization's radio button.
8. Click the second **Select** button or click the **Close** button to close the screen.

When the second **Select** button is clicked, the *Create Account* screen displays the selected primary organization. For more information see.

6 Manage State Department User Accounts

1. Perform one of the following steps to edit an account:
 - a. Click the appropriate **Manage** button in the **Action** column on the *Search Accounts* screen.
 - b. Click the **Manage** button on the *Account Details* screen after an account have been created or saved (edited).

When the **Manage** button is clicked via either option, the *Manage Accounts* screen opens.

AMS
Manage Accounts

Manage Account

Note: Any changes to the account are **not saved** until you hit the save button.
- For example, if you affiliate someone, he/she is not actually affiliated until you hit the save button.

User Information

User Type
State

User ID
RHOADESDUSTY

Primary Organization
U.s. Department of State

Contact Information

Last Name
Rhoades

First Name
Dusty

Middle Name

Email
eRATest@mail.nih.gov

Confirm Email
eRATest@mail.nih.gov

Roles

+ Add Countries x Remove All

Role(s)	Country	Action
FACTS_SDC_MGR_ROLE	South Africa	x Remove

Showing 1 - 1 of total 1

Save Cancel Reset Password

NOTE: Fields grayed out cannot be edited.

Perform one or more of the following steps :

1. Edit the **Email** addresses, if necessary.
2. Click the + **Add Countries** button to add countries.
 - a. For more information, please refer to the [Add/Delete Countries](#) topic.
3. Click the **Remove** button to remove a country from the list in the *Roles* section.
4. Click the **Reset Password** button to reset the user's password.
 - a. Please refer the [Reset Password](#) topic for more information.
5. Perform one of the following options:
 - a. Click the **Save** button to save the changes.
 - b. Click the **Cancel** button to return to the *Account Details* screen.

When the **Save** button is clicked, the *Account Details* screen displays with the following message:
Account was updated successfully!

The screenshot shows the 'Account Details' page in the AMS system. At the top, there's a 'Manage Accounts' tab. The main content area has a 'Go Back' button in the top right corner. A green success message banner reads 'SUCCESS Account was updated successfully!'. Below this, the 'User Information' section displays fields for 'User Type' (State), 'User ID' (RHODESDUSTY), and 'Primary Organization' (U.s. Department of State). The 'Contact Information' section shows 'Name' (Rhodes, Dusty) and 'Email' (eRATest@mail.nih.gov). The 'Roles' section shows a table with one role: 'FACTS_SDC_MGR_ROLE' for 'South Africa'. At the bottom, there are 'Manage' and 'Back to Search' buttons. The 'Go Back' button and the bottom buttons are circled in red.

Role(s)	Country
FACTS_SDC_MGR_ROLE	South Africa

6. Perform one of the following options on the *Account Details* screen:
 - a. To return to the *Search Accounts* screen displaying the previous search results, click the **Go Back** hyperlink.
 - b. To edit the account's information, click the **Manage** button.
 - c. To return to the *Search Accounts* screen to enter new search criteria, click the **Back to Search** button.

6.1 Affiliate Account

NOTES:

- Only accounts with *scientific* roles such as PI, SPONSOR, POSTDOC, ASST, etc., are permitted to be affiliated with more than one institution.
 - Accounts with *administrative* roles can belong to one institution only.
 - Further, if a user leaves (unaffiliates) an administrative role at one institution, that account cannot be affiliated to a different institution in any administrative **or** scientific role: The user needs to create a new account to use with the new institution.
 - Additionally, you cannot remove administrative roles from an existing account in order to add a scientific role instead: Once a user has held administrative role, he or she must create a new user account to use in another role.
-
1. To affiliate an existing account with an organization, search for the user in AMS and select the **Manage** button in the action column of the search results.
 2. Click the **Affiliate** button under *Roles* on the Manage Account screen, as shown here:

Manage Account [Go Back](#)

Note: Any changes to the account are not saved until you hit the save button.
- For example, if you affiliate someone, he/she is not actually affiliated until you hit the save button.

User Information

User Type
Commons

User ID
XAVIERKNIGHT

Primary Organization
Children

Contact Information

Last Name
Knight

First Name
XAVIER

Middle Name

Email
eRATest@mail.nih.gov

Confirm Email
eRATest@mail.nih.gov

Roles

[+ Affiliate](#)

Role(s)	Organization(s)	Action
PI	Children's Hospital Corporation	
POSTDOC	Children's Hospital Corporation	

Showing 1 - 2 of total 2

[Save](#) [Cancel](#)

When the **Affiliate** button is clicked, the Add Roles screen opens, as shown here:

NOTE: The list of roles is dependent on the logged in user's role.

AMS | Add Roles

Organization
University of California Los Angeles

Role(s) (to multi-select, please use ctrl or shift keys)

- AA - Accounts Administrator
- AO - Administrative Official
- ASST - PI Assistant
- BO - Business Official
- FCOI - External FCOI Officer
- FCOI_ASST - Financial Conflict of Interest (FCOI) External Assistant role
- FCOI_VIEW - Financial Conflict of Interest (FCOI) External View role
- FSR - Financial Reporting users
- GRADUATE_STUDENT - Graduate Student
- PACR - Public Access Compliance Role

[Close](#) [Add Role\(s\)](#)

1. Highlight the appropriate role(s).
2. Click the **Add Role(s)** button.

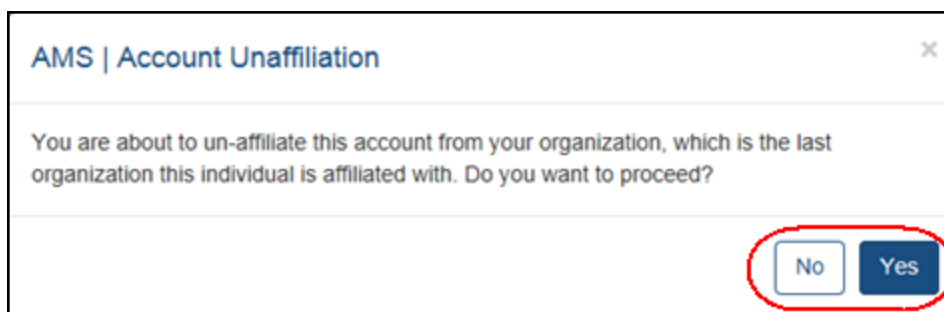
When the **Add Role(s)** button is clicked, the role is added, the account is placed in 'Active' status, and the **Unaffiliate** button appears in the *Roles* section, as shown here:



6.2 Unaffiliate Account

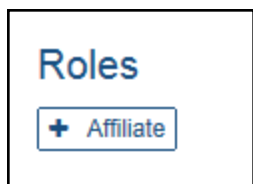
1. To unaffiliate an account, click the **Unaffiliate** button in the *Roles* section of the *Manage Account* screen.

When the **Unaffiliate** button is clicked, an *Account Unaffiliation* pop-up screen displays.



2. Click the **Yes** button to unaffiliate the account, or click **No** to cancel the unaffiliation.

When the **Yes** button is clicked, all roles assigned to the account are removed, the account is placed in 'Pending Affiliation' status, and the **Affiliate** button appears in the *Roles* section of the *Manage Account* screen, as shown here:



IC Transfer Process

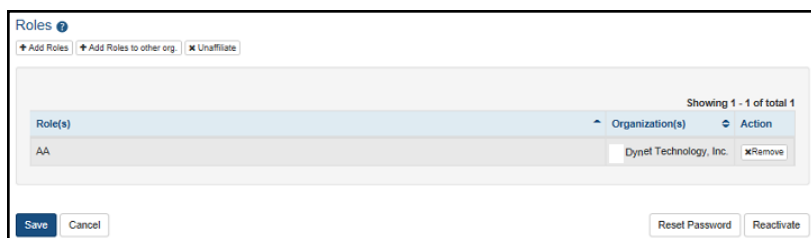
1. The Account Coordinator will un-affiliate the account by removing all roles for their IC.
2. The account will go into 'Pending Affiliation' Status, in which there are no roles associated with the account, and the user cannot perform any functions.
3. An Account Coordinator from the new IC will search for accounts in 'Pending Affiliation' status and select an account to affiliate.

For information on Affiliating an account, see [Affiliate Account](#).

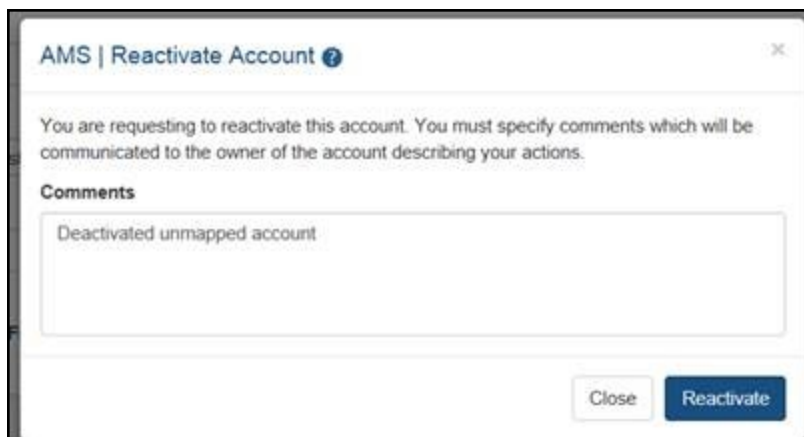
6.3 Reactivate Account

Follow these steps to reactivate an account that has been deactivated by an administrator.

1. Open the account in the *Manage Account* screen.
2. If an account is deactivated, a **Reactivate** button will be present at the bottom of the *Manage Account* screen, as shown here. Click this button to proceed.



3. When you click **Reactivate**, the *Reactivate Account* screen opens, as shown here.



4. In screen, take these steps:
 - a. *Mandatory*: Enter comments in the comments field to inform the user about this action.
 - b. Click **Reactivate** to reactivate the account, or click **Close** to cancel.
5. When you click **Reactivate**, the system reactivates the account and displays a confirmation message.
And the account owner receives an email notification that includes the text you entered in the **Comments** field.

NOTE: The unlock notification asks the user to login to the account that same day. If the user does not login before the end of the day, the account is locked again.

6.4 Add/Delete Countries

NOTE: The Add Countries functionality is for State Department users only.

1. To add a country to the account, click on the + **Add Countries** button on the *Create Accounts* screen.



When the + **Add Countries** button is clicked, the pop-up *Add Countries* screen displays.

AMS | Add Countries

Role

FACTS_SDC_MGR_ROLE

Countries

- Afghanistan
- Albania
- Algeria
- Andorra
- Angola
- Anguilla
- Antarctica
- Antigua/Barbuda
- Armenia
- Argentina

Close Add Countries

2. To find a country, click in the list of countries and type the first letter of the country's name.
 - a. For example, to find the United Kingdom hit the <U> key on the keyboard.
3. Highlight the appropriate country name.

When a country name is highlighted, the **Add Countries** button is enabled.

4. Perform one of the following options:
 - a. Click the **Close** button to close the screen.
 - b. Click the **Add Countries** button to add the selected country.

When the **Add Countries** button is clicked, the selected country is added to the *Roles* section on the *Create Account* or *Manage Account* screen.

Roles ?

+ Add Countries X Remove All

Showing 1 - 1 of total 1

Role(s)	Country	Action
FACTS_SDC_MGR_ROLE	United Kingdom	X Remove

5. To add another country, click the + **Add Countries** button. Repeat the steps above.
6. To remove a country, click the **X Remove** button.

7. To remove all countries, click the **X Remove All** button.

7 User Reports

AMS includes the following reports capabilities:

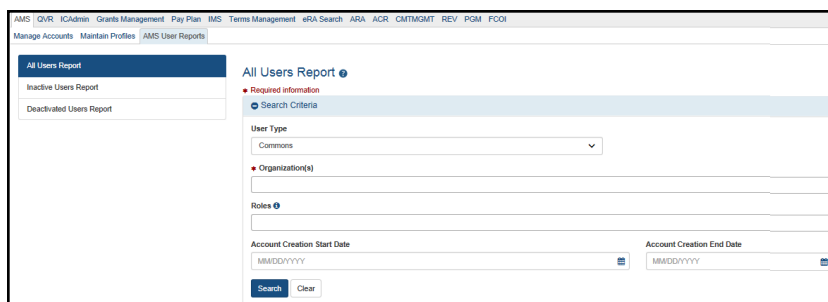
- **All Users Report** — Information on all user accounts in your organization
- **Inactive Users Report** — lists user accounts that have been locked due to inactivity (**note:** for internal users only)
- **Deactivated Users Report** — lists user accounts that have been deactivated by an administrator (**note:** for internal users only)
- **Role Description Report** — lists all roles, role descriptions, and associated privileges for any business area (**note:** for internal users only)

To open the reporting functions, click the **AMS User Reports** tab.

The *All Users Report* screen opens. There are two versions of this screen, as shown below. The version you see depends on the organization you belong to.

7.1 All Users Report Screen for External Users

All Users Report screen for Commons, external iEdison, and State Department users

The screenshot shows the 'All Users Report' screen in the AMS system. On the left, a sidebar contains three buttons: 'All Users Report' (highlighted in blue), 'Inactive Users Report', and 'Deactivated Users Report'. The main content area is titled 'All Users Report' and includes a 'Required Information' section with a 'Search Criteria' sub-section. This section contains a 'User Type' dropdown menu set to 'Commons', an 'Organization(s)' text field, a 'Roles' section with a plus icon, and two date pickers for 'Account Creation Start Date' and 'Account Creation End Date', both set to 'MM/DD/YYYY'. At the bottom of the search criteria are 'Search' and 'Clear' buttons.

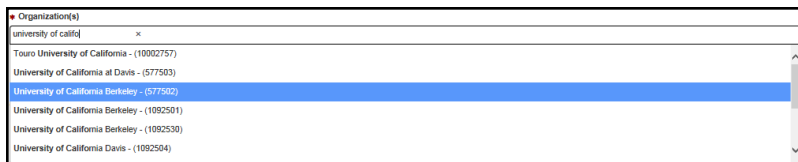
Use this screen to run an All Users Report on external users.

The **All Users Report** button is selected by default, as shown below. Follow the steps below to launch the report.

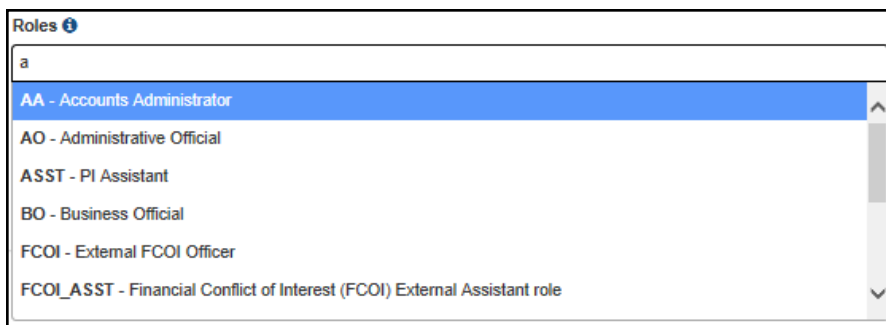


1. Select "Commons" in the **User Type** field and set the search criteria in the other fields as follows:

- 2. Organization** — This field displays your organization name. Service Desk agents, to select an organization, begin typing its name or ID number in this field. The live search function displays organization names as you type. When the one you want appears, scroll down and click to select it, as shown below. (**note:** To select multiple organizations, hold the <Ctrl> key as you click.) **Note:** This field is mandatory.



- 3. Roles** — Leave this field blank to report all user roles. To limit the report to one or more user roles, click this field to open the drop-down menu or begin typing the name of a role. The live search function displays roles as you type. When the one you want appears, scroll down and click to select it, as shown below. (**Note:** To select multiple roles, hold the <Ctrl> key as you click.)



- 4. Account Creation Start Date/End Date** — Leave these fields blank to report all time periods. To limit the report to a certain time period, enter a start date, end date, or start and end dates. Enter dates in MM/DD/YYYY format or click the calendar icon to select them from the calendar.
- 5.** When you finish entering search criteria, click **Search** to run the report. See [Report Output](#) below.

7.2 *Role Description Report*

7 Report Output

7.3 All Users Report output

To run the All Users report, click the **All Users report** button and enter search criteria [as described above](#). When you click the **Search** button for the All Users report, the report output displays.

The screenshot shows the 'All Users Report' interface. It includes a search bar with the text 'Filter:' and a 'Show 10 per page' dropdown. The table displays the following data:

User ID	Alias User ID	Name	Account Creation Date	Last Login Date	Roles & Affiliations
SA000007	SA000007	Sam, Jeremy	2011-07-20		TRAMEE - University of California Berkeley
BE000002	BE000002	Beaton, Nick	2013-01-25		ASST - University of California Berkeley
CR000007	CR000007	Crab, David	2013-05-02		TRAMEE - University of California Berkeley
SA000007	SA000007	Samuel, Michael	2014-09-02	2015-06-30	TRAMEE - University of California Berkeley
VL000002	VL000002	Viller, Kevin	2015-06-01		UNDERGRADUATE - University of California Berkeley
VA000007	VA000007	Vander, Jason	2014-10-10	2015-12-08	POSTDOC - University of California Berkeley
PL000007	PL000007	Plummer, Bill	2015-04-09	2015-04-09	PI - University of California Berkeley
GR000002	GR000002	Gray, Tom	2015-06-01	2015-06-01	GRADUATE_STUDENT - University of California Berkeley
CA000002	CA000002	Carroll, Orlando	2014-09-27	2015-06-30	POSTDOC - University of California Berkeley

7.4 Role Description Report output

7.5 Navigating the report output

These tips for browsing, filtering and exporting the report output apply to all report types.

The report output displays include the controls shown here.

The screenshot shows the 'Search Results' interface. It includes a search bar with the text 'Filter:', a 'Show 10 per page' dropdown, and a table header with the following columns:

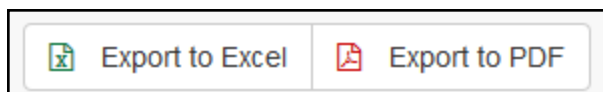
User ID	Alias User ID	Name	Account Creation Date	Last Login Date	Roles & Affiliations
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- To filter the report, type some text in the **Filter** field, such as a name. Only rows that contain the filter term will be displayed, and all instances of the filter text will be highlighted in yellow, as shown below:

Filter:

Account Creation Date ▲	Last Login Date ▲▼	Roles & Affiliations
2011-07-20		TRAINEE - University of California
2013-05-02		TRAINEE - University of California
2014-09-02	2015-06-30	TRAINEE - University of California

- To adjust the number of records displayed, select a number in the **Show per page** drop-down menu.
- To navigate the report pages, click a **Page Number** or use the left and right arrow buttons.
- To re-sort the report columns in ascending or descending order, click the up/down arrows in the column headers.
- To export the report output as an Excel spreadsheet or PDF, click the appropriate **Export** button, shown here:



- **Export to Excel**

When you click this button, an open-or-save dialog opens, as shown here.



Click **Open** to open the report data in Excel. A new Excel window opens. Go to it and click the **Enable Editing** button in the yellow bar at the top of the worksheet, then work with the spreadsheet as usual.

- **Export to PDF**

Click this button to save the report as a PDF file. A save dialog opens. Choose a location and save the file.